

The advanced
moving-image enthusiast



The demanding
fiction lover



The satisfied
TV savourer



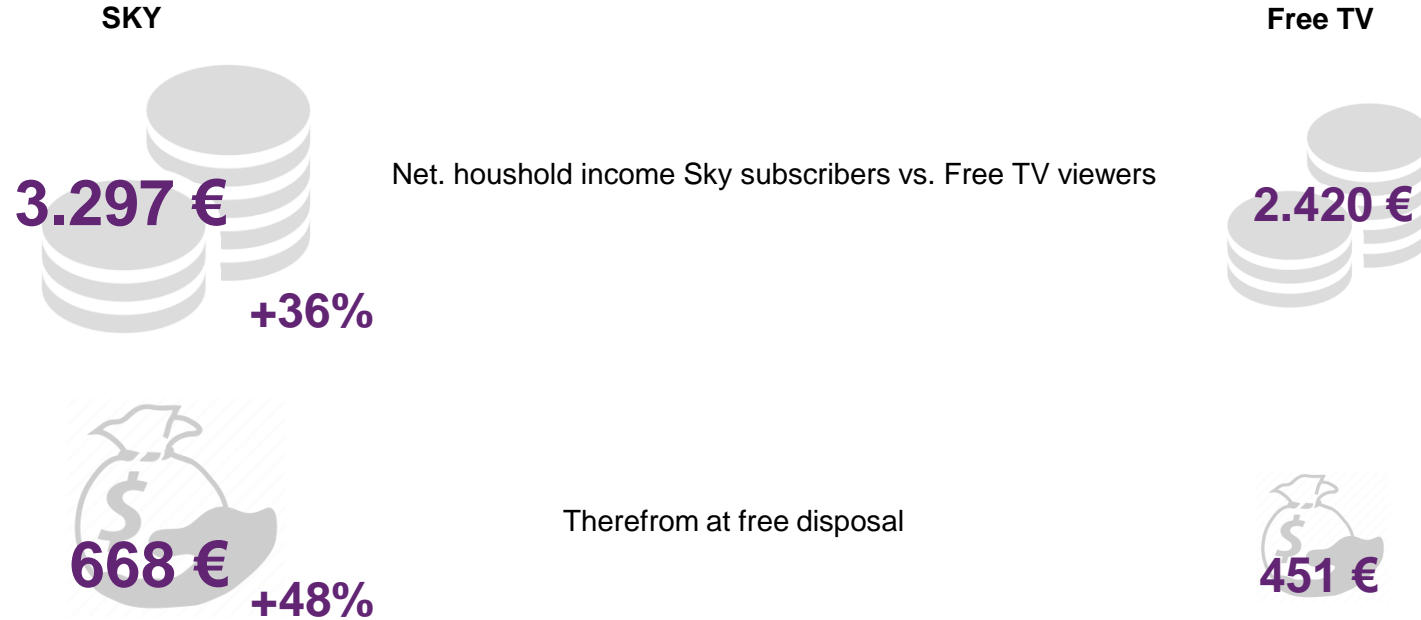
The sociable
TV interested

The BetterViewer

Target group study about the difference between Sky subscribers and Free TV viewers

The Sky viewer exhibits a high purchasing power

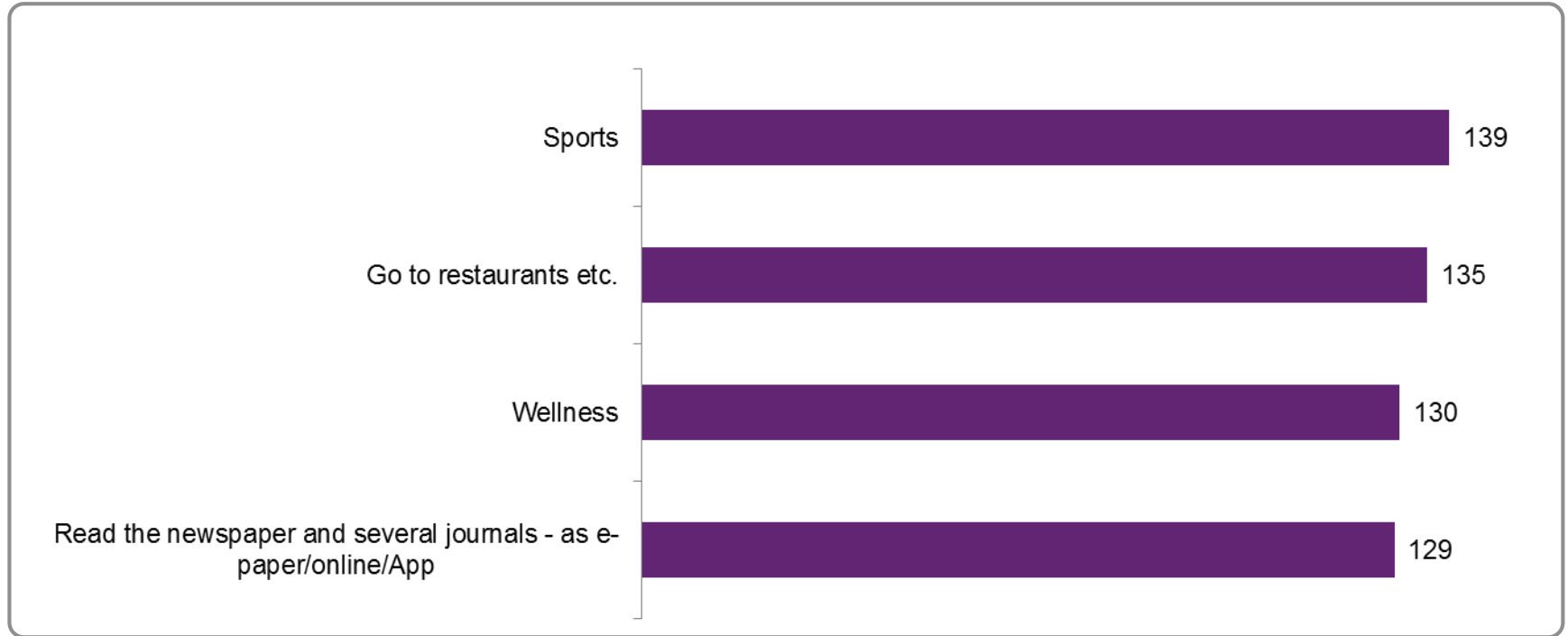
Social demographics



Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; Base: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media

Sky viewers are active and invest in their leisure time

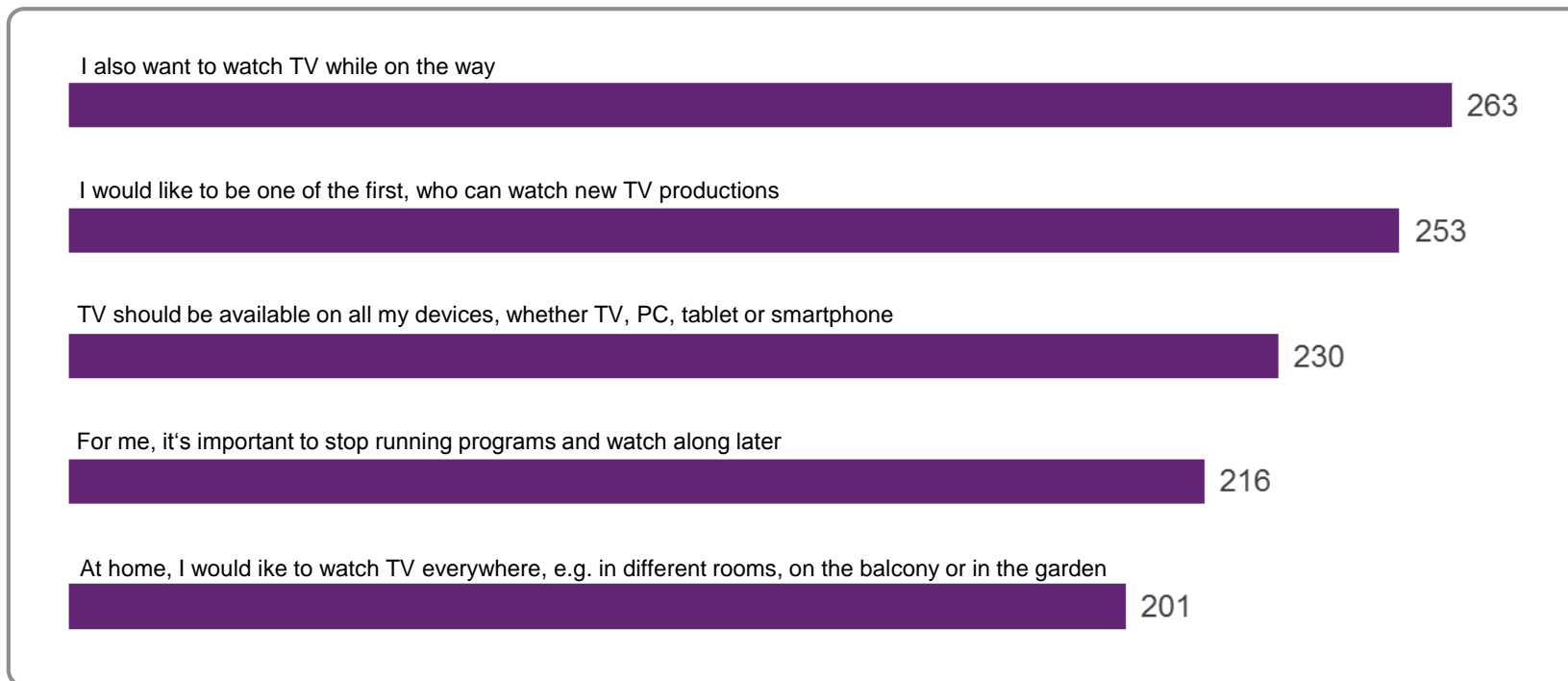
Interests (Index)



Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; Base: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media; Index = Sky Viewer / Free TV Viewer x 100

Sky viewers are individual, technology-oriented, trendy and flexible

Viewing behaviour (Index)



Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; Base: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media; Index = Sky Viewer / Free TV Viewer x 100

Sky viewer: Early adopter with high quality and brand awareness

Consumer world

Sky viewers buy specific and emphasize quality of all product categories

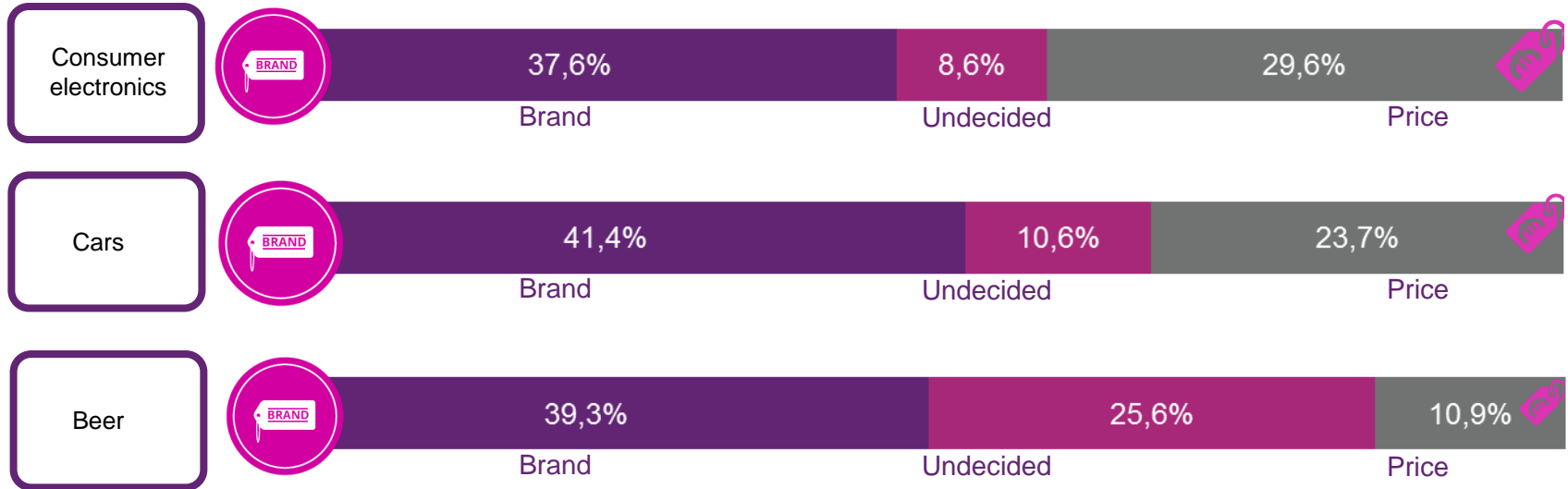


Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; Base: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media; Index = Sky Viewer / Free TV Viewer x 100

Sky viewers are more brand-conscious than Free TV viewers

Consumer world: „For me, the brand is more important than the price“

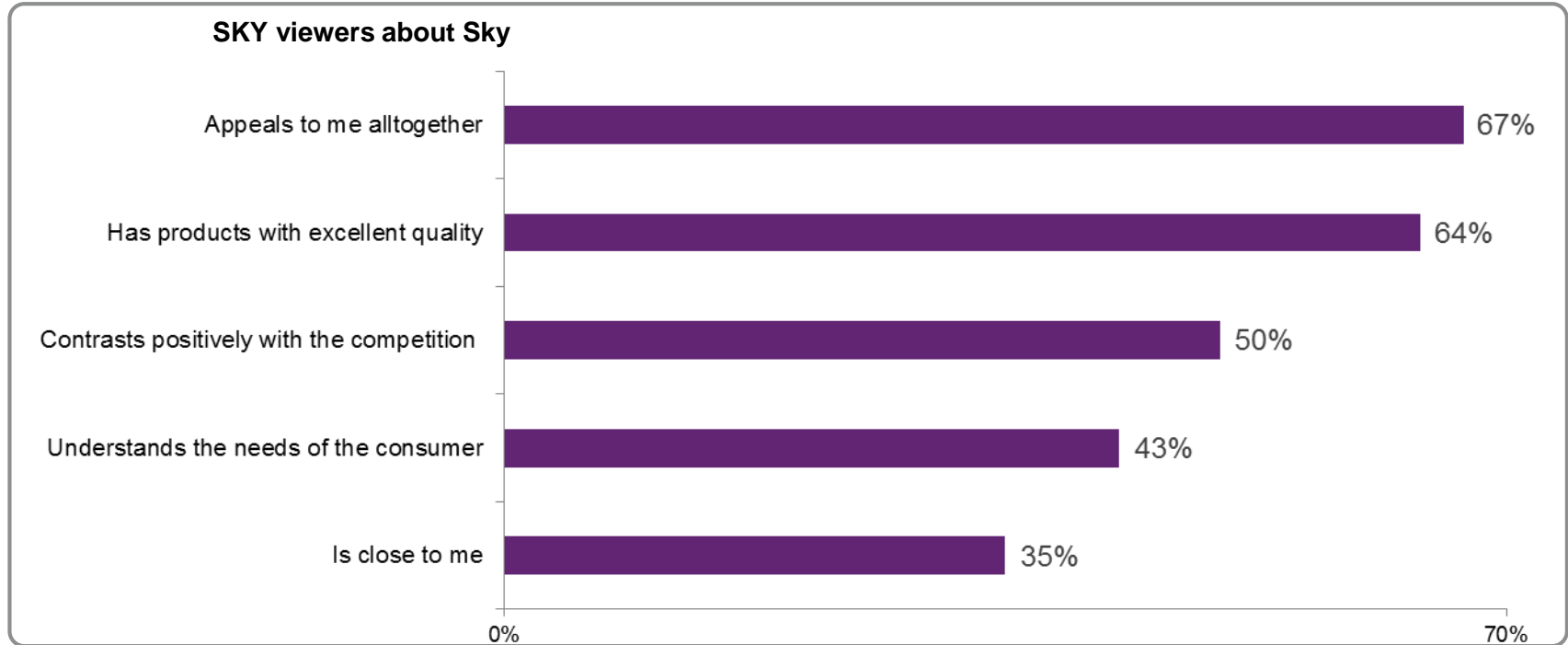
The brand across all lines of business is on average **16%** more important for Sky viewers than for FreeTV viewers.



Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; Base: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media; Index = Sky Viewer / Free TV Viewer x 100

Sky conforms to this high demand

Evaluation of Sky



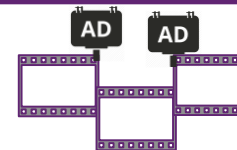
Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; Base: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media; Index = Sky Viewer / Free TV Viewer x 100

Sky viewers like the exclusive and upmarket advertising environment

Comparison of advertising quality

55%

“The Ad blocks on Sky are pleasantly short”



35%

“Advertising on **Sky** is entertaining”



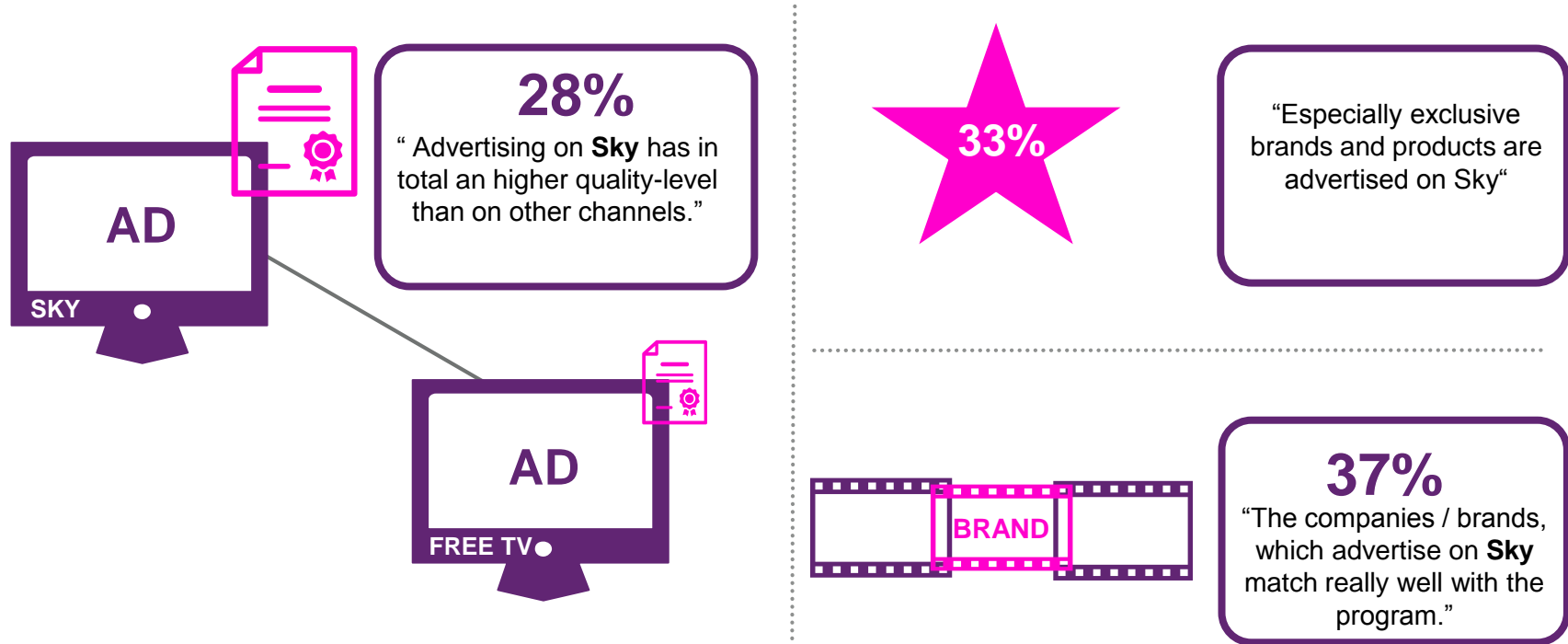
11%

“Advertising on TV (in general) is chiefly entertainment.”

Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; Base: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media

With Sky to a qualitatively better advertising perception

Comparison of advertising quality



Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; Base: n = 2.329. Survey December 2014/January 2015. Under contract to Sky Media

Higher chances on Sky regarding activation through advertising

Advertising appeal

The activation caused by advertising on Sky is

48 %

higher than the activation on Free TV, particularly of (Index):



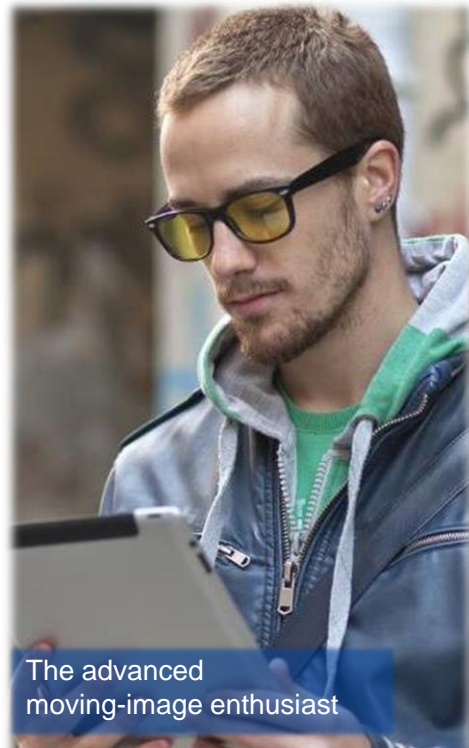
Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; Base: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media; Index = Sky Viewer / Free TV Viewer x 100

High potential regarding the activation through advertising

Summary



Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; basis: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media



The advanced
moving-image enthusiast



The demanding
fiction lover



The satisfied
TV savourer



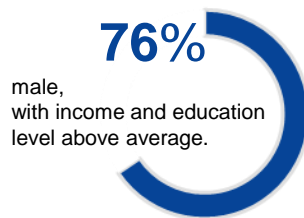
The sociable
TV interested

The BetterViewer in detail

The advanced moving-image enthusiast

His motto: „Work hard – play hard“

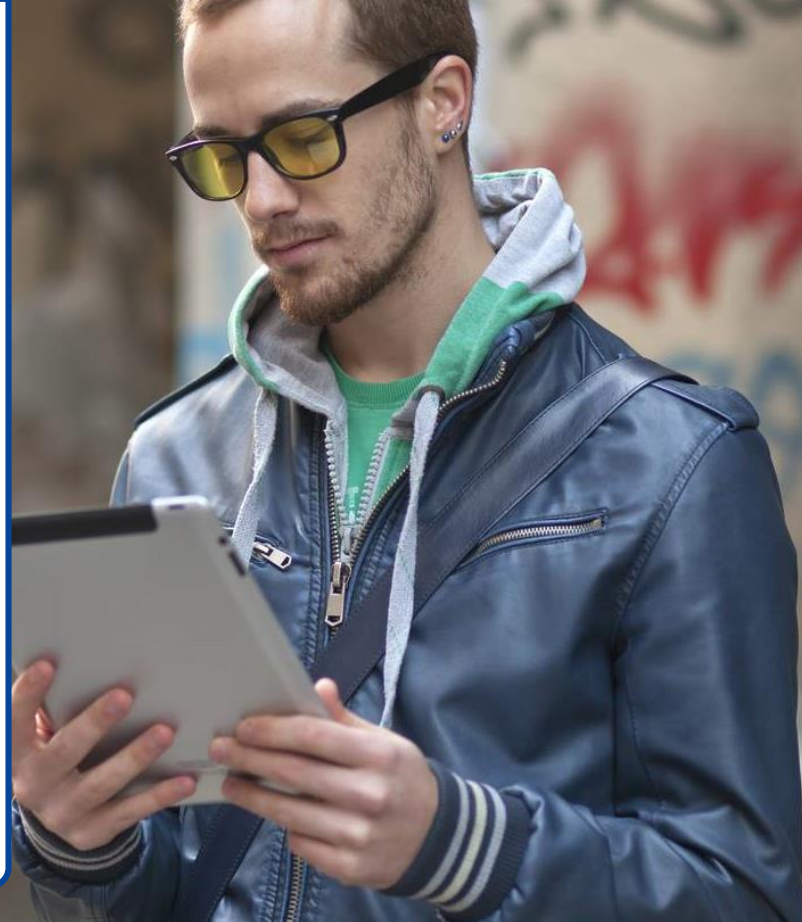
- Early Adopter, First Mover, Trendsetter und Opinion Leader.
- Always one step ahead when it comes to technology.
- Uses all opportunities. Watching television is an event for him.
- Flexibility, independent of location, content in highest quality is his requirement.



Household income per month
Ø 2.793 €



35% with A-Level



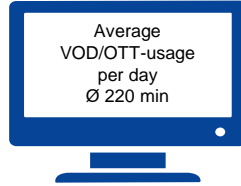
Source: Tracking-survey in cooperation with TNS infratest – Target group adults 14+; Basis: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media

Quality and trend-conscious

Viewing behaviour and world of values



Ø Number of screens:
2,4



Ø Size of screens:
46"



Quality is more important
than the price: Index 157

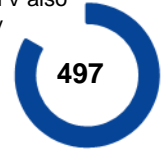
Quality vs. Price

Worlds of values (Index)



Viewing behaviour (Index)

I want to watch TV also
while on the way



I like to be
one of the first,
who can watch
new TV
productions



At home, I like to watch
TV everywhere



Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; Base: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media;
Index = advanced moving-image enthusiast/ respondents total x 100

Early adopter who responds positively to advertising

Consumer world and attitude towards advertising

Consumer behaviour (Index)

364



I'm often one of the first who purchases new innovative products or uses new services

319



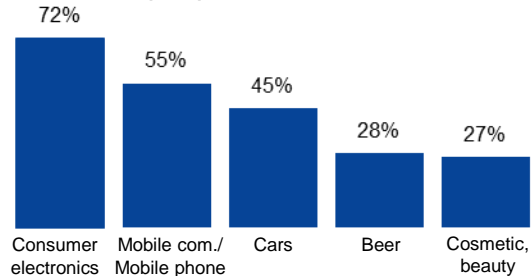
I always know what's trendy

285



Regarding products and brands, I am often ask for my opinion

Top 5 product interests



Attitudes to / acceptance of (TV) advertising (Index)

TV advertising is helpful / credible

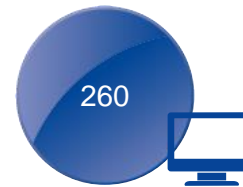
163

TV advertising can be entertaining

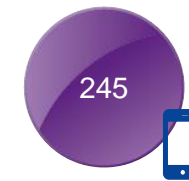
135

70% have been searching for some pieces of information about a product / service after watching advertising

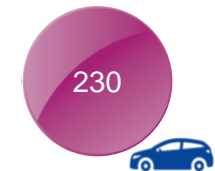
I spend much money on (Index)...



Consumer electronics



Mobile communications/
Mobile phone



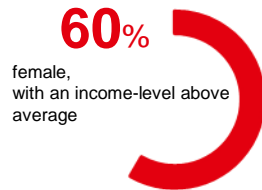
Cars

Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; basis: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media

The demanding fiction lover

Her motto „Shows, social media & TV“

- Movies and series are her passion.
- She is a binge-viewer, watching episode 1-12.
- Very communicative, a great multiplier both on- and offline.



Household income
per month Ø 2.366 €

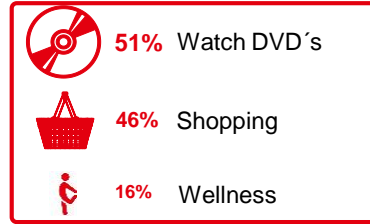
53% Work



Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; basis: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media

Success-oriented and active

Interests, viewing behaviour and world of values



Leisure activities



92% like to watch several episodes at a stretch



Linear vs. non-linear

Viewing behaviour (Index)

I like to be one of the first, who can watch new TV productions

281

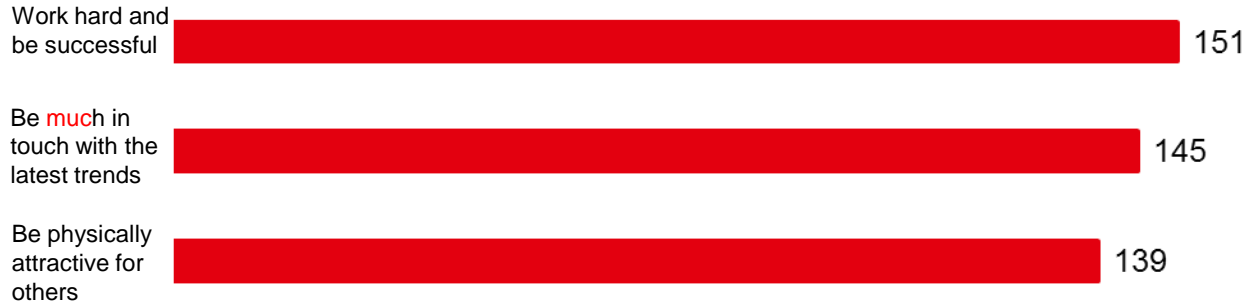
For me it's important to select from a big program library

236

While watching TV, I often surf the internet simultaneously to learn more about the current program

226

Worlds of values (Index)



Source: Sky TV-Typology / TNS Infratest, 2015- target group adults 14+; Base: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media;
Index = demanding fiction lover/ respondents total x 100

Receptive to added-value-orientated advertising

Consumer world and attitude towards advertising

Consumer behaviour (Index)

193



Regarding products and brands, I am often ask for my opinion

191



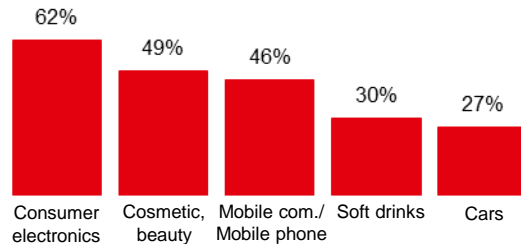
I love to lash out on expensive things: Luxury makes life better

187



I always know what's trendy

Top 5 product interests



Attitudes to / acceptance of (TV) advertising (Index)

TV advertising is helpful / credible

171

TV advertising can be entertaining

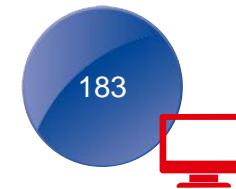
143

TV advertising can be disturbing

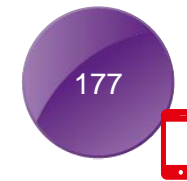
88

62% have been searching for some pieces of information about a product / service after watching advertising

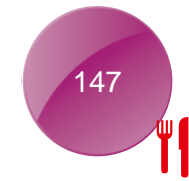
I spend much money on (Index)...



Consumer electronics



Mobile communications/
Mobile phone



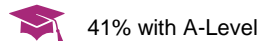
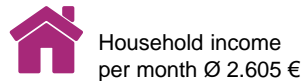
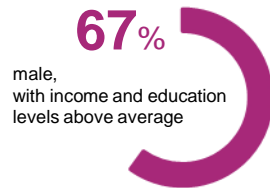
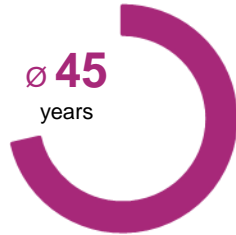
Instant meals

Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; Basis: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media

The satisfied TV savourer

His motto „Sofa + TV = pleasure“

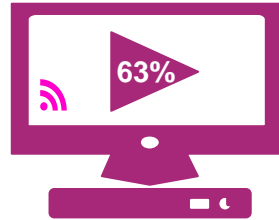
- After work it directly takes him to the sofa, especially to watch football and sports.
- Will never miss a live-sport event.
- Records his favourite movies or shows to watch them whenever it suits him best.



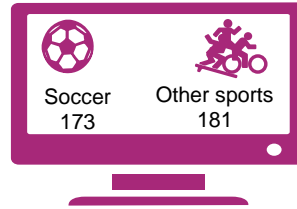
Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; Basis: n = 4.298. Survey December 2014/January 2015. Under contract to by Sky Media

Sports-mad and down-to-earth

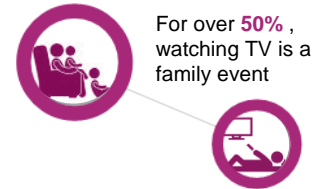
Viewing behaviour and world of values



Usage Sky+ / hard disk recorder



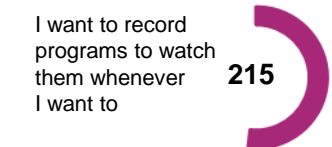
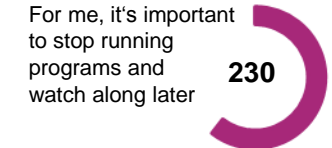
Genre interests



Worlds of values (Index)



Viewing behaviour (Index)



Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; Base: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media;
Index = satisfied TV savourer/ respondents total x 100

Is interested in consumer electronics and cars

Consumer world and attitude towards advertising

Consumer behaviour (Index)

119



I'm interested in news about technology

109



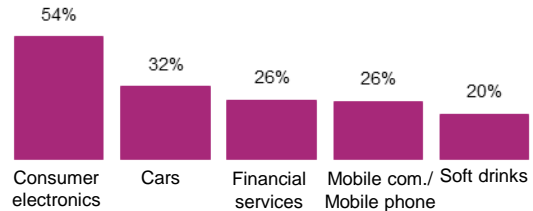
Major purchasing decisions are made together

108



I often spend more money than I intended to

Top 5 product interests

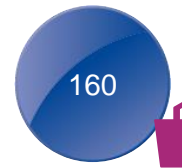


Attitudes to / acceptance of (TV) advertising

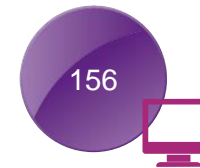


63% have been searching for some pieces of information about a product / service after watching advertising

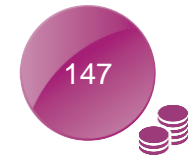
I spend much money on (Index)...



Soft drinks



Consumer electronics



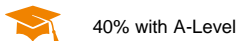
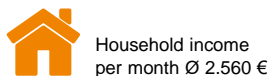
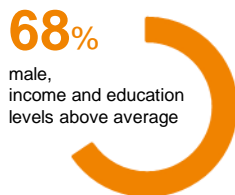
Financial services

Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; Basis: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media

The sociable TV interested

His motto „TV bonfire with friends and family“

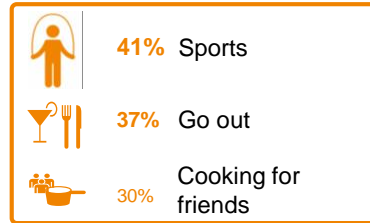
- Active in his leisure time.
- In constant exchange with friends and family.
- TV-highlights live, online, on demand or via hard drive recorder create a special occasion.
- TV as a social factor for moments together.



Source: Sky TV-typologie / TNS infratest, 2015- target group adults 14+, Basis: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media

Shares experiences with family and friends

Interests, viewing behaviour and world of values



Leisure activities



61% use VOD- / OTT-services
at least once a week

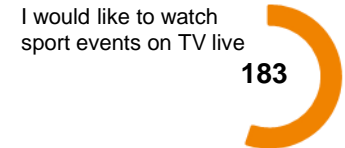
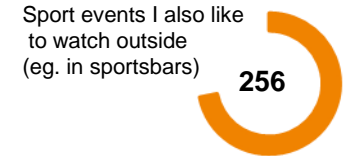


Over 60% experience TV
together with family or
friends

Worlds of values (Index)



Viewing behaviour (Index)



Source: Sky TV-typology / TNS infratest, 2015- target group adults 14+; Base: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media;
Index = sociable TV interestes/ respondents total x 100

High interest in consumer electronics, cars and mobile communications

Consumer world and attitude towards advertising

Consumer behaviour (Index)



205

I'm often the first who purchases new and innovative products



191

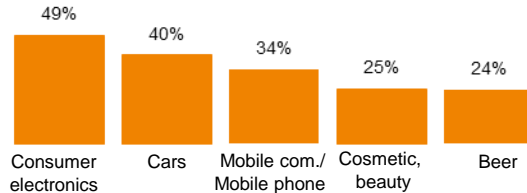
My flat has to have an exclusive reputation



183

If there's a new fashion, I will often wear it immediately

Top 5 product interests



Attitudes to / acceptance to (TV) advertising (Index)

TV advertising is helpful / credible



TV advertising can be entertaining



TV advertising can be disturbing

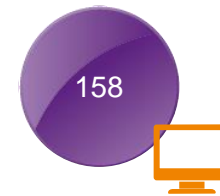


64% have been searching for some pieces of information about a product / service after watching advertising

I spend much money on (Index)...



Sport bets



Consumer electronics



Mobile communications/
Mobile phone

Source: Sky TV-typologie / TNS infratest, 2015- target group adults 14+; Basis: n = 4.298. Survey December 2014/January 2015. Under contract to Sky Media

Methodology

	Sky customer	External market (Prospects)
Population	Online ≥ 14 years in Sky households on Germany	Online ≥ 14 years in Not-Sky households in Germany
Method	CAWI (Computer Assisted Online Interviewing) on base of Sky customer addresses	CAWI (Computer Assisted Online Interviewing) on the Online Access Panel
Sample	In total 2,329 interviews were performed	In total 2,069 interviews were performed
Field time	5. December 2014 – 20. January 2015	
Sampling approach	Recruiting on base of: <ul style="list-style-type: none"> - Customer addresses, provided by Sky and stratified after relevant characteristics (type of reception, subscribed packages, states) - Sky customer who have consented to participate in the Establishment Survey (September and October 2015) - Main income earner was questioned about the recruiting of other household members, to guarantee a representative sample of all persons 14+ living in Sky customer households 	Recruiting out of the Online Access Panel. To guarantee the representative nature of the sample following quotas were fulfilled: <ul style="list-style-type: none"> - Age and gender - Education, occupation - Household size - Region, education - Pay TV-subscription - VOD-usage - TV reception
Weighting	Adaptation to the structure of the newest Establishment Survey (Households and persons) or rather of the stratified guidelines of Sky of the address-sample.	Adaptation to the structure of the Sky Market Trackers (Households and persons).
	Allocation of both samples to display a realistic total: Sky customer 12% and prospects 88%	

Contact

Sky Media GmbH
Medienallee 26
85774 Unterföhring
www.skymedia.de

E. info@skymedia.de
T. +49 (0)89 / 99 58 - 7143
F. +49 (0)89 / 99 58 - 2553

Sales Director
Ralf Hape
T. +49 (0)89 / 9958 -7157
ralf.hape@sky.de

Director Audience and Media Research
Dirk Otto
T. +49 (0)89 / 9958 -7014
dirk.otto@sky.de